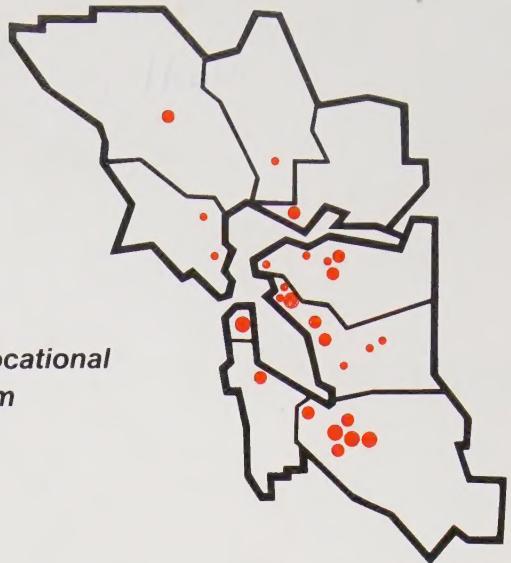


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Bay Area Corporate Locational Survey

An in-depth look at past and planned locational shifts—and the motivations behind them



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Bay Area Corporate Locational Survey

November 1984

Much has been written about the Bay Area's changing economic growth patterns, the forces shaping them, and the implications for our future prosperity. Yet most of the basis for discussion has been anecdotal.

To provide a more systematic and objective view of the Bay Area's changing corporate locational patterns, the Bay Area Council joined with Gruen Gruen + Associates, an urban economic/marketing research firm, to conduct a survey of Council member firms and other Bay Area businesses. The survey was funded by CPS Commercial Real Estate Co., a major commercial developer in the Bay Area; it was designed and conducted by Gruen Gruen + Associates, with the cooperation and assistance of the Bay Area Council.

This summary presents highlights of the survey, which examines businesses' locational shifts over the past five years and anticipated shifts over the coming five years, and explores the factors motivating those decisions. It is based on responses from 103 firms in the nine-county region.

The majority of the firms fall into three economic sectors: manufacturing (47%), finance/insurance/real estate (18%), and transportation/communications/utilities (11%). The sample breakdown by headquarters or primary Bay Area location is: San Francisco (37%), Santa Clara County (26%), Alameda County (17%), San Mateo County (15%), Contra Costa County (3%), and Marin County (3%).

Numerically, this sample is a small fraction of the businesses operating in the Bay Area, and is by no means representative of all firms in the region. But it is an excellent sampling of larger firms in the region. Together, the firms responding to the Council survey represent 284,488 Bay Area employees—12% of all private-sector wage and salary employment in the region in 1984—and occupy 112 million square feet of the area's commercial building space.

The largest-sized firms in the sample—those employing 1,000 or more—represent 258,000 workers, or 57% of all 1979 Bay Area employment in firms of this size. Thus, the significance of the survey is as an indicator of the past, present, and future locational decisions of the region's largest employers.

A complete analysis of the Bay Area Corporate Locational Survey is contained in a 98-page report produced by Gruen Gruen + Associates. The full report is available from the Bay Area Council at a cost of \$50. To order, contact the Council at (415) 981-6405.

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Key Findings

Motivating Influences

- The availability of professional and skilled labor, image and prestige of location, transportation costs and commute time, and attitudes toward industry were all critical factors in locational decisions of firms that expanded or added Bay Area locations over the past five years.
- These growing Bay Area firms view housing costs as the single factor that "pushed" them most strongly from their existing locations.
- The cost and availability of land and space is the most influential "pull" factor in siting facilities planned for the coming five years.
- Larger-sized firms (especially those employing 2000 or more) are more influenced by factors relating directly or indirectly to labor supply; smaller firms are more attuned to the image of locations, and the proximity to similar businesses, customers/clients, and support industries.

Past Locational Decisions

- Of 63 firms that established at least one new site with 100 or more employees between 1978-83, 56% located both within and outside the Bay Area, 21% solely in the Bay Area, and 24% solely outside the region.
- Within the Bay Area, these firms accounted for a net total increase of 336 new facilities or site expansions over the past five years; 86 of them are new or relocated facilities employing 100 or more workers.
- Santa Clara County was the recipient of 40% of new Bay Area sites (of 100 employees or more) established over the past five years, followed by San Francisco (19%), San Mateo County (15%), and Contra Costa and Alameda Counties (8% each).
- Fifty firms established at least one new site outside the region; 86% of these located at least one new site outside California, 32% one or more sites outside the U.S.

- Over the past five years, those sampled established 320 sites outside the region; 71% of these were in U.S. states outside California.
- Larger firms were most likely to seek locations outside the Bay Area; of 30 firms occupying one million or more square feet of space in the region, 70% established at least one new facility at a non-Bay Area location.

Future Expansion

- Forty-two of the firms surveyed plan to establish at least one new site with 100 or more employees in the next five years; of these 42, 33% expect to locate both within and outside the region, 26% solely within the Bay Area, and 40% solely outside the region.
- The survey underscores the growing strength of Contra Costa County as an employment center; 17% of the sample firms' planned sites, 34% of building space, and 34% of regional employment growth are slated for this location. Contra Costa County employment by those sampled is expected to grow 79% over the next five years (not taking into account employment eliminated at closed sites).
- Santa Clara County and San Francisco will continue to be major recipients of growth, although their market shares will decrease. Santa Clara County accounts for 37% of future sites, 28% of building space, and 33% of employment planned by firms expanding in the region; San Francisco for 7% of sites, 14% of space, and 14% of planned Bay Area employment growth.
- Planned new sites in the Bay Area represent a total of 13,843,000 square feet of new building space, housing 49,178 employees. In terms of building space, the additions anticipated for the next five years represent a 15% gross increase over existing space usage by all firms sampled, and are equivalent to 86% of space increases in the past five years.
- Major employers will continue to direct a significant proportion of growth outside the Bay Area and outside California; 31 firms indicate they will establish at least one site outside the region. Their plans call for location of 190 or more new sites outside the Bay Area in the next five years, 55% of them in U.S. locations outside California.
- Again, larger firms are more likely to expand or relocate elsewhere. Half of all firms occupying one million or more square feet of space in the region expect to locate at least one new site outside the Bay Area.

The survey is an indicator of past, present, and future locational decisions of the region's largest employers.

Motivating Forces: Getting at the "Why?"

The greatest value of the Council survey may be in the insights it can offer those who shape the policies framing our economic future. For those involved in the decision-making process, the most important thing is knowing why Bay Area corporate leaders make the locational decisions they do.

To help identify the motivations behind locational patterns, firms that changed the number, size or location of Bay Area facilities over the past five years, or plan to do so in the next five years, were asked to rate the influence of various factors in those decisions. Seventeen separate motivating influences were rated in importance, both as "push" factors repelling the firm from present or previous locations, and as "pull" factors attracting the firm to new locations.

To permit this dual rating, the factors were described in neutral terms, such as "the cost of land and building space." Each factor could thus be viewed as either a positive influence (low site costs), or a negative one (high costs). All factors were rated on a scale from 0 to 10, from no importance in locational decisions to the highest importance.

The differentiation between attracting and repelling factors recognizes that a given factor can have a "push" value quite different from its strength as a "pull" ingredient. For example, a community's negative attitude toward business may strongly influence a decision to expand in a new location, while at the same time, a local government's positive attitude toward business may not be viewed as offering much advantage over a community with a relatively neutral business climate.

There is another reason to distinguish between repelling and attracting factors. A firm may make a decision to relocate or expand elsewhere based on one or more overriding reasons; these negative factors must be strong enough to overcome all the pressures to expand at the existing location. However, once the firm is open to considering alternative new locations, a much wider set of factors can come into play.

"Push" factors must be strong enough to overcome all the pressures to expand at existing locations.

Larger firms are more concerned with factors relating to labor supply, smaller firms with image and proximity.

Overview

Availability of professional and skilled labor, the image and prestige of a location, transportation costs and commute time, attitudes toward industry, and housing costs were all critical factors in the locational decisions of firms that have established Bay Area locations over the past five years.

Along with the cost and suitability of space, they are also important influences in the planned moves of Bay Area firms.

Responses show a relationship between the size of firms (measured by employment) and the ranking of factors. Larger-sized firms are more inclined to identify factors relating directly or indirectly to labor supply; smaller firms are more attuned to the image of locations, and the proximity of similar businesses and support industries.

Behind Past Decisions

Forty-one firms that established at least one new location with 100 or more employees in the region within the last five years provided ratings for the "push/pull" factors. Table 1 shows mean scores for the five most important repelling and attracting factors for these firms.

It is worth noting that a number of these factors are interrelated. For example, the availability of professional and skilled labor, the top-ranked "pull" factor, is being affected by housing costs. The high cost of housing, especially homes close to the region's major employment centers, is making it more difficult for firms to recruit skilled employees. Commute distance and costs also affect the price and availability of labor.

An analysis of "pull" factors by size of firm points up some variations that cannot be taken as definitive, due to the small sample size, but suggest some differences in locational motivation. Firms with 500 or fewer employees rate proximity to similar businesses as the top attracting factor, and availability of support industries as number three, showing how important clustering is to these smaller businesses. For these smaller firms, the availability of skilled labor does not appear among the five most important factors.

The analysis suggests that corporate feelings of vulnerability to public opinion increase with size. Attitudes toward industry is the third-ranked factor for both large (2000+ employees) and mid-sized firms (501-2000 employees), but is not of importance to small firms. The results also reflect the fact that finding suitable land and space becomes more difficult as the size of the facility increases; only firms in

the largest size category identify the cost and suitability of land and building space among important attracting factors.

The comparison of "pull" factor rankings for the manufacturing and financial/insurance/real estate (FIRE) sectors shows just as many differences, bearing in mind the caveat that sample sizes were small (17 and 9 firms, respectively). These two sectors had only one "pull" factor in common—the availability of professional and skilled labor—but both ranked it number one.

Behind Planned Moves

The results below are based on responses of 29 firms that plan to establish one or more new Bay Area locations in the next five years. Again, the factors

attracting them to new sites are of greater strength than the factors repelling them from existing Bay Area locations.

As shown in Table 2, the cost and suitability of land and building space is the top-ranked factor in both the "push" and "pull" categories. This factor is ranked among the five most influential "pull" concerns of firms in all size categories, but is most important to the largest firms (2000+ employees).

The concern of large firms with availability and cost of labor is evident; they not only rank that factor third among "pull" influences, but give high ratings to related factors such as transportation costs and commute time, housing costs, and availability of housing near industry sites (the second, fourth, and fifth rankings respectively).

Housing costs, transportation, and the availability of labor are inter-related.

Table 1
Factors Most Influencing Decision to Locate New Sites Within Bay Area 1978-83

Mean Score	"Pull" Factors Attracting to New Location	Mean Score	"Push" Factors Repelling from Prior Location
4.1	Availability of prof./skilled labor	2.5	Housing costs
3.3	Image/prestige of location	2.4	Cost/suitability of land/space
3.2	Transportation/commute time	2.2	Attitudes toward industry
3.1	Attitudes toward industry	1.9	Image/prestige of location
3.1	Proximity to similar businesses	1.9	Transportation/commute time

sample = 41 firms that established new Bay Area locations in past five years

Table 2
Factors Most Influencing Decision to Locate New Sites Within Bay Area 1983-88

Mean Score	"Pull" Factors Attracting to New Location	Mean Score	"Push" Factors Repelling from Prior Location
5.1	Cost/suitability of land/space	2.8	Cost/suitability of land/space
4.4	Availability of prof./skilled labor	2.1	Attitudes toward industry
4.0	Image/prestige of location	1.9	Housing costs
3.9	Transportation/commute time	1.9	Cost of labor
3.1	Attitudes toward industry	1.6	Transportation/commute time

sample = 29 firms that established new Bay Area locations in next five years

Past Locational Shifts 1978-83

Of the 103 firms in the sample, 63 added, expanded, eliminated or relocated one or more sites within the Bay Area between 1978 and 1983, while 50 located at least one new site outside the region.

Within the Bay Area

Together, the 63 firms that made some change in Bay Area facilities represent a net total of 336 new sites or site expansions. Of these, 86 sites represent 100 or more additional workers.

Manufacturing firms account for half of the 86 new or relocated sites, 21% are occupied by firms in the FIRE sector, 11% by transportation/communications/utilities (TCU) firms, and 11% by retailers. The primary activities at these locations are: HQ/managerial/administrative (34%), production/assembly (19%), and sales/marketing (13%); 23% of relocated or expanded facilities were headquarters locations, and 6% more combined administrative headquarters with other functions. (A "primary activity" is one in which 50% or more of the workforce is engaged.)

Almost 40% of the 86 new or relocated sites established over the past five years are in Santa Clara County, followed by San Francisco (19%), San Mateo County (15%), and Alameda and Contra Costa Counties (8% each). (See Table 3.)

The data also give some indication of the size and labor-intensity of these facilities, by location. While Santa Clara County accounts for 40% of new or relocated sites in the region, it accommodates 47% of the new or relocated employees and 54% of the new or relocated building space in facilities employing more than 100. At the other extreme is San Mateo County, with 15% of the region's sites, but just 6% of employees and 8% of building space.

Two-thirds of the facilities were leased, 27% purchased, and 6% were located at sites already owned by the firm.

Outside the Bay Area

Fifty firms report locating at least one new site outside the Bay Area over the last five years; 15 of them located all new facilities outside the region. Of these 50 firms, 86% located at least one site in the U.S. outside California, and 32% outside the U.S. Within California, the most popular location was Sacramento/Roseville; 38% of the firms that added sites in the state but outside the Bay Area established at least one location there. (Because some firms established sites in more than one area, the total percentages exceed 100.)

These firms established a total of 320 new facilities outside the region, 71% of them located in the U.S. outside California.

Larger firms were most likely to seek locations outside the region; of 30 respondent firms occupying one million or more square feet of space in the region, 70% established at least one new facility at a non-Bay Area location (see Table 5).

Labor factors were prominent among reasons given for locating outside the region. Of the 18 manufacturing firms that established locations elsewhere, 10 identified the availability or the cost of labor as the primary reason for their move. The cost of labor was of particular concern for firms employing 2000 or more. FIRE and other firms were not influenced by any single factor, but by a variety of forces.

Looking Ahead: Planned Locational Shifts 1983-88

Forty-one percent of the total sample—42 out of 103 respondents—plan new facilities over the next five years. Of them, 11 expect to locate solely within the Bay Area, 17 solely outside the region, and 14 both within and outside the area.

Within the Bay Area

Of the 103 firms sampled, 41 plan to add, expand, eliminate, or relocate facilities in the Bay Area within the five-year horizon; 25 of these firms anticipate the expansion or addition of sites. Their plans call for the net addition or expansion of 186 sites. (In gross figures, they plan 318 new sites; the net figures take into account 132 anticipated site eliminations, three-fourths of them by just two firms. For purposes of analysis, net figures have been used.)

Fifty-four of the new or relocated facilities are expected to require a workforce of 100 or more employees by 1988. These represent a total of 13,843,000 square feet of new building space, housing 49,178 employees. In terms of building space, the additions anticipated for the next five years represent a 15% gross increase over existing space usage by all firms sampled, and are equivalent to 86% of space increases in the past five years.

Twenty-five of those sites (46%) are planned by manufacturing firms, while the FIRE and TCU sectors account for 8 sites each (15%), and retailing for 7 (13%). All analysis of planned Bay Area locations that follows is based on this sample of 54 locations.

Bay Area locational preferences follow, to some degree, the pattern of the last five years. The major new factor is the emergence of the Tri-Valley and central areas of Contra Costa County as an important employment center.

This area is the single greatest recipient of new building space planned by these firms for Bay Area locations. Contra Costa County accounts for 17% of planned sites, but 34% of planned space and 34% of employment. In comparison, Santa Clara County is the recipient for 37% of sites, 28% of planned space, and 34% of employment; San Francisco for 8% of sites, 14% of planned space, and 14% of employment. (See Table 4.)

**Firms employing
2000 or more are the
most likely to seek
locations outside
the Bay Area.**

These three major employment centers account for 77% of all building space (10.4 million square feet) and 82% of all employment (nearly 40,000 employees) planned for new or expanded sites of 100 or more employees in the region.

When viewed from the standpoint of the *rate of growth*, the survey data show how quickly Contra Costa County is gaining strength as an employment center. Employment in the county by the firms surveyed grew 24% from 1978-83 (not counting jobs

eliminated at closed sites), but is expected to expand by 79% in the next five years. Sonoma County is also gaining strength as a corporate location, with a 59% expansion of employment expected over the next five years (not counting jobs eliminated at closed sites).

The number of workers at San Francisco sites grew 17% in the 1978-83 period, and is expected to expand 9% between 1983 and 1988. Reported employment gains in Santa Clara County represent a 38% increase

**Santa Clara County
and San Francisco
will remain pre-
dominant...but
Contra Costa
County is rapidly
gaining strength as
a major employ-
ment center.**

Table 3
**Distribution of New Bay Area
Facilities Established 1978-83**

County	Sites		Employees		Space (000 SF)	
	No.	Pct.	No.	Pct.	No.	Pct.
Santa Clara	34	40%	27,587	47%	8,747	54%
San Francisco	16	19%	11,649	20%	2,741	17%
Alameda	7	8%	4,914	8	1,337	8%
Contra Costa	7	8%	3,970	7%	750	5%
San Mateo	13	15%	3,359	6%	1,315	8%
Marin	3	3%	4,229	7%	432	3%
Sonoma	3	3%	1,871	3%	537	3%
Solano	2	2%	367	*	136	*
Napa	1	1%	207	*	64	*
TOTAL	86	100%	58,153	100%	16,059	100%

* = less than 1%

Note: all sites have 100 or more employees; employee/space information missing for some sites

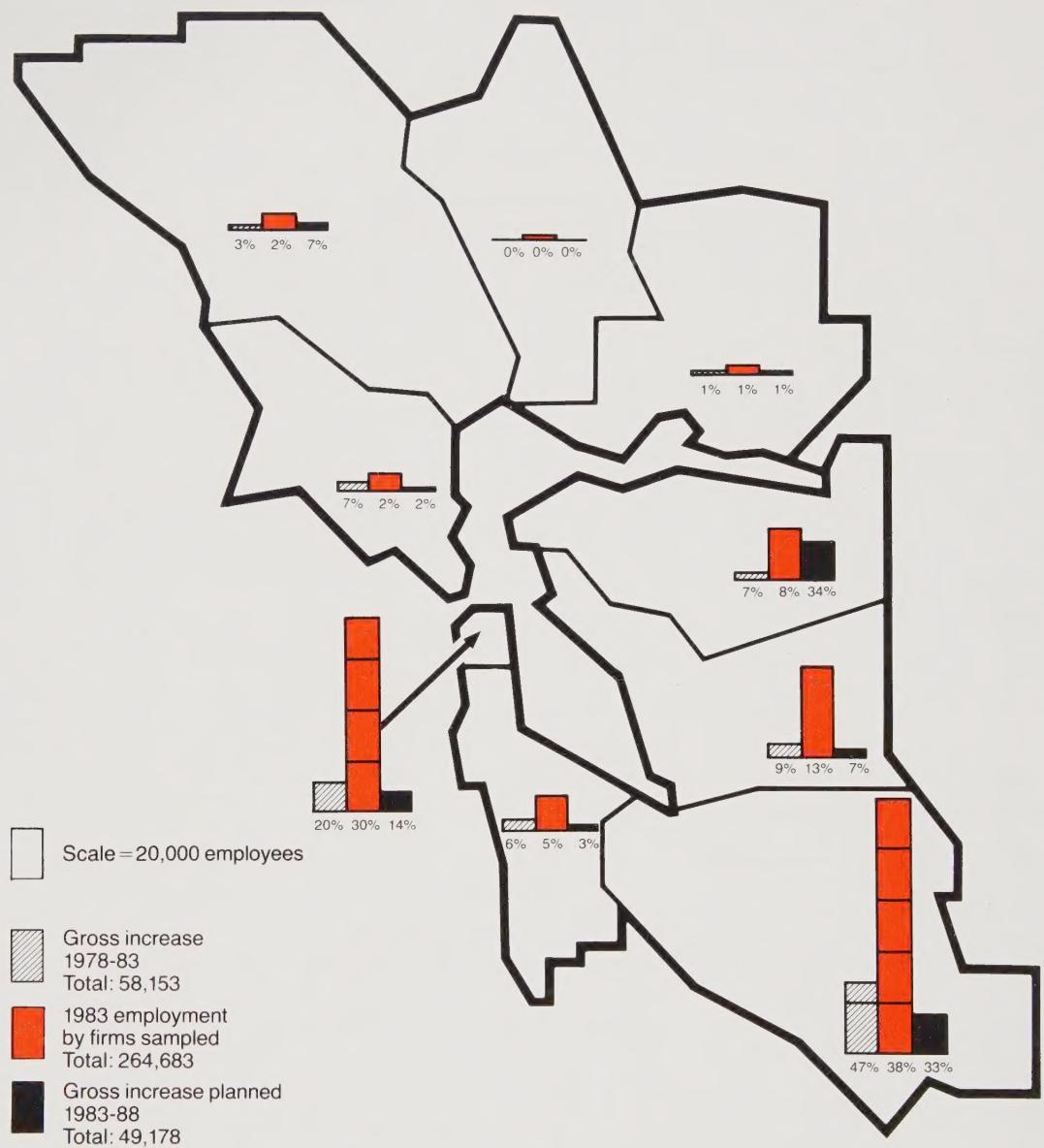
Table 4
**Distribution of New Bay Area
Facilities Planned for 1983-88**

County	Sites		Employees		Space (000 SF)	
	No.	Pct.	No.	Pct.	No.	Pct.
Santa Clara	20	37%	16,450	34%	3,808	28%
Contra Costa	9	17%	16,564	34%	4,765	35%
San Francisco	4	7%	6,700	14%	1,900	14%
Alameda	10	19%	3,324	7%	1,300	9%
Sonoma	3	6%	3,600	7%	783	6%
San Mateo	4	7%	1,400	3%	740	5%
Marin	3	6%	810	2%	372	3%
Solano	1	2%	330	*	175	1%
Napa	—	—	—	—	—	—
TOTAL	54	100%	49,178	100%	13,843	100%

* = less than 1%

Note: all sites have 100 or more employees; employee/space information missing for some sites

Figure 1
**Past, Present & Future Bay Area
 Employment by Firms Surveyed**



over the past five years, with a 16% expansion of workforce planned by 1988, as shown in Figure 1. (These figures are not adjusted for employment eliminated at closed sites.)

Expected growth at planned locations of 100 or more employees over the next five years is expected to increase building space by 8% in San Francisco County, 10% in Santa Clara County, and 72% in Contra Costa County.

Sales/marketing use is the primary activity anticipated at 26% of planned locations (compared with 13% of sites added in the past five years). Twenty-six percent are planned for HQ/managerial/administrative functions, with 11% intended as headquarters facilities. An additional 6% will combine headquarters with other functions. Production/assembly is the primary use for 15% of future sites.

Outside the Bay Area

Survey results show that major employers will continue to direct a significant proportion of growth outside the Bay Area and outside California. Thirty-one firms indicate they will establish at least one site outside the region. While those sampled are planning 186 new or expanded locations in the Bay Area (net of eliminated sites), they anticipate locating 190 or more new sites outside the region.

As over the past five years, most of these sites are targeted for U.S. states outside California, notably Colorado, Texas, and North Carolina. California's Central Valley accounts for 23% of planned sites, and is the preferred location for financial and other commercial firms seeking to serve that area's growing population. The Sacramento/Roseville area, slated for 5% of future sites, is preferred by large manufacturing firms.

Again, the larger firms sampled, which include a high concentration of manufacturers, seem more inclined to direct future growth elsewhere. Of the 28 respondents with more than 2,000 employees, 46% plan at least one new site outside the region, compared to 23% of firms in the 501-2000 employee category (see Table 6).

Consistent with other survey results, the availability of labor was the single most important reason cited to locate outside the region, particularly for firms employing 500 or more.

The motivations of these larger firms have a significance greater than their numbers imply. For example, only one manufacturing respondent listed the availability of housing as the key factor attracting the firm to locations outside the region, but that firm currently occupies over 6 million square feet of space in the region.

Major employers will continue to direct a significant proportion of growth outside the Bay Area, and outside California.

Table 5
Location of Sites Established by
Bay Area Firms 1978-83, by Size of Firm

	Total		500 or fewer employees		501-2000 employees		2001+ employees	
Inside & Outside Bay Area	35	34%	9	28%	11	26%	15	54%
Inside Bay Area Only	13	13%	2	6%	8	19%	3	11%
Outside Bay Area Only	15	15%	4	13%	7	16%	4	14%
No New Sites	40	39%	17	53%	17	40%	6	21%
ALL FIRMS SURVEYED	103	100%	32	100%	43	100%	28	100%

Table 6
Location of Sites Planned by
Bay Area Firms 1983-88, by Size of Firm

	Total		500 or fewer employees		501-2000 employees		2001+ employees	
Inside & Outside Bay Area	14	14%	3	9%	4	9%	7	25%
Inside Bay Area Only	11	11%	2	6%	5	12%	4	14%
Outside Bay Area Only	17	17%	5	16%	6	14%	6	21%
No New Sites	61	59%	22	69%	28	65%	11	39%
ALL FIRMS SURVEYED	103	100%	32	100%	43	100%	28	100%

The Bay Area Council Perspective

The findings of the Bay Area Corporate Locational Survey offer both challenge and reassurance to those concerned with the region's economic future.

One key insight emerges strongly: the majority of the factors most influential in locational decisions are not related to market forces, but are shaped by public policy decisions. The analysis of "push/pull" factors documents the need for continuing efforts to address such key issues as housing costs, the high cost of land, and the cost and length of the home-to-work commute. From the Council's own standpoint, these results provide new reinforcement for our current agenda, with its focus on housing, transportation, land use policies, and job training.

The survey also points out the degree to which our economic climate is shaped by intangible and subjective factors. "Attitudes toward industry" is consistently among the top-ranked factors influencing locational decisions, especially for medium- and large-sized firms employing 1,000 or more. For smaller businesses that are expanding in the region, the image and prestige of locations is the single most important attracting influence.

If we wish to enhance the prospects for economic expansion in Bay Area communities and the region as a whole, it is necessary that we go beyond traditional approaches to economic development. We must also address issues concerning the region's quality of life.

The other aspect of the survey—the tracking of past and future locational shifts—provides us with a benchmark in the region's evolution as an economic center. In the past, most of the region's economic activity was located on or near the shores of San Francisco Bay. Now we are seeing the emergence of a dramatic new trend—the movement of job-producing activities into central Contra Costa County and southeastern Alameda County. As the survey findings confirm, that area's available land for large-scale commercial sites, along with its potential for affordable housing development, offer major employers an attractive option for continued growth in the region.

At the same time, it is clear that for some types of firms and industries, such as large manufacturers, the economic benefits of expansion within the region are being outweighed by certain diseconomies, especially those relating to the cost of land and the direct and indirect costs of labor. Such firms are the most likely to direct expansion to locations outside the Bay Area, and in most cases, outside California.

Yet it is important to bear in mind that the movement of manufacturing firms from urban centers to smaller communities and rural areas is a trend not only in the Bay Area, but nationwide. Since many of them serve international markets, it is natural that they seek new and varied locations as their production and distribution networks expand.

This is not to say that the region can no longer attract such activities as major new production and assembly firms. Although the survey findings show office-based headquarters, administrative, and sales activities to be predominant among Bay Area facilities planned for the next five years, 15% of future sites employing 100 or more will be dedicated to production and assembly.

It also appears that even for large Silicon Valley firms, the pressures to seek new locations are to some degree mitigated by the pull of the region's existing cluster of high-tech industries, its outstanding educational institutions, and last but not least, its status as the cradle of high technology. These forces are leading many major high-tech firms to seek sites that are either in Silicon Valley, or within easy driving distance of it. We believe that other parts of the Bay Area can and will benefit from the spillover of Silicon Valley's growth.

While the firms surveyed plan to direct a substantial portion of future growth outside the region, the Bay Area will itself attract a sizeable share of their expansion. Of the medium- and large-sized firms (500 or more employees) that are planning new or expanded facilities in the next five years, 63% expect to establish at least one site in the region. Their plans call for the addition of nearly 14 million square feet of commercial space over the next five years, to house more than 49,000 employees.

The overall picture drawn from the survey is that of a dynamic and expanding regional economy. Maintaining that momentum will depend not on our efforts to attract new activity, but on whether we provide the physical and social infrastructure needed to accommodate continued economic growth.

Most of the influential factors in locational decisions are shaped not by market forces, but by public policy decisions.

To maintain momentum, we must go beyond traditional approaches to economic development.

About the Survey

Of the Bay Area Council's approximately 350 corporate members, 119 were selected for the survey. This group was augmented by 96 other major private-sector employers selected from the Bay Area Employer Directory. The firms were chosen to achieve a broad and balanced sampling of private employers of various types, sizes, and locations. While the firms chosen were of all sizes, the sampling process favored larger firms.

The survey instrument was a detailed 17-page written questionnaire mailed to each firm's chief executive officer in the region. The survey was completed in late February, 1984. Responses were received from 103 firms in the nine-county region, ranging in size from 32 to 26,000 employees; with an average employment of 2,762.

It is important to note that all sampling involves a certain margin for statistical error; the larger the size of the sample relative to the population it represents, the smaller the error.

In this case, the more fundamental point is that this survey has been designed to produce results indicative of the behavior and attitudes of major corporations, rather than all Bay Area businesses. A strict interpretation of numerical results can be misleading, especially in cases where a subset of the sample is used as the basis for analysis. Those utilizing and interpreting the data should bear these limitations in mind.

All percentages have been rounded to the nearest figure. Survey results of less than 10% have generally been omitted from this summary. All employment figures are for full-time workers or the equivalent (two part-time employees equal to one full-time).

Unless otherwise cited, the Bay Area Council Corporate Locational Survey, as analyzed by Gruen Gruen + Associates, is the source of all data presented.

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